



ADP Sales Management Performance Tool

Workshop Session Exercises

The Workshop Session is a critical immersion pieces, one that sets up stakeholder “buy-in” and serves as the creative springboard for the Discovery team to develop product ideas and a roadmap.

The Workshop is a collaborative session held at ADP offices where we will align the key stakeholders on the objectives of the project, define the business requirements of the Sales Performance Tool, define the user context, and assess the underlying technology and its implications on performance, IA and user contexts. The key objectives are to get collective agreement on the strategy and scope of the project.

The exact structure of the workshop will be influenced by the Business and User Research conducted in the previous week. Typical workshop activities include (but are not limited to):

Exercise 1:

Defining the Vision and Objectives for the Tool

1. On a sticky note, write down an app “Vision” statement specific, one or two sentences

The vision for the ADP SPM mobile app is _____

EXAMPLE:

The vision for the ADP Sales Performance Management (SMP) mobile app is to help sales representatives envision, track and achieve their sales goals.

Exercise 2:

Identify Key User Journey Grid

Create a grid with key stages on one axis and information to gather on the other.

Now as a group work through the first column. For each row start writing information on post it notes and add it to the grid. For example what tasks is the user trying to complete in the dashboard phase? Write each task on a separate post it note and add it to the appropriate cell on the grid.

The reason to write them on post it notes is that as the day goes by you may well restructure the grid. You may also decide that a task happens later in the process.

Begin by identifying the key stages a user passes through in their interaction with the tool. This often involves stages such as:

- **Login**
- **Dashboard**
- **Rollcall**
- **Transactions**
- **Earnings**
- **Liabilities**

The second decision the group needs to make is what information you want to map about the user. What do you need to know at each of these key stages in their interaction.

- **Tasks.** What is the user trying to achieve at this stage?
- **Questions.** What does the user want to know at this stage?
- **Touchpoints.** How does the user interact with the organization at this point?
- **Emotions.** What is the user feeling at this stage in the process?
- **Weaknesses.** How does the organization let the user down at this stage?

	Dashboard	Rollcall Summary	Transactions Summary	Earnings Summary	Liabilities Summary
Tasks					
Questions					
Touchpoints					
Emotions					
Weakness					

Exercise 3:

Prioritize Features and Functionality

Card Sorting exercise based on features the user needs

1. On a sticky note, write down features and functionality a user needs
2. Then write down features and functionality participants want
3. Organize features into 3 piles from most important to least important with both users and participants